

Team: Retail Customer Service, Sales & Marketing	Prepared By: V. Anthony, B. Vagenas, P. Bellino
Subteam: Customer Service Walk In	Date Prepared: 8/25/2000
Conceptual Design Area: Walk-in Offices	

DOCUMENTS INCLUDED IN THIS CONCEPTUAL DESIGN PACKAGE:

All documents in this package are on Intranets.com in the following folder:

<Type folder name here>

Document Type	Format	Document Subject/ Name
Project Scope	Doc	•
Summary Blueprint	Ppt	•
Process – Flowcharts	Ppt	•
Organization – Organization Chart	Ppt	•
Organization – Roles & Responsibilities	Doc	•
Performance – Metrics	Doc	•
Culture – Cultural Characteristics	Ppt	•
Facilities & Layout	Doc	•
Application – IT Application Requirements	Xls	•
Equipment & Delivery	Doc	•
Gap – Gap Definition	Doc	•
Gap – Gap Analysis Options & Recommendations	Doc	•
Gap – Application Gap Closure Approach	Ppt	•
Detailed Business Case	Xls	•
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9/27

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PROJECT SCOPE – Walk In/Bay State Gas & Northern Utilities/Close All

What work needs to be done?

- Verify and re-evaluate Business Case Lites for Baystate
- Develop qualitative and/or quantitative profile of customers using Walk In offices
- Complete process mapping for major processes (i.e. social security verification, payment remittance protected account documentation, C&I Application follow up, Collection Order scheduling and feedback, F/A exception corrections, Cromwell Waiver)
Identify alternative payment methods/options and research pricing
- Identify customer contact channels and research pricing
- Identify and possibly reassign back office work
- Explore options for elimination of unneeded office equipment
Identify regulatory issues and requirements
- Develop an initial communication strategy for dealing with PUC's and DTE
- Develop communication strategy and plan for communities impacted, customers and employees
All company printed communications must be updated
- Develop plan to move customers to other payment options (ie postage prepaid envelope, Ambassador, expand third party network, EFT)
- Assign project to a Project Manager who will be responsible for implementation of plan to close 5 BSG Walk-in facilities.

Which organization(s) is/(are) impacted? Employees Impacted? Customers Impacted?

Organizations : A variety within Bay State Gas & Northern Utilities, Specifically, Call Center, Community Relations, Revenue Recovery, Treasury, Cash Processing, Office Security, Facilities Management.

In addition: Third party agencies, Fuel Assistance Agencies, City and State Welfare Departments, Courier Services, Building maintenance and cleaning

Employees: CSR's, both at the offices and the Call Center, Supervisory Personnel

Customers: Customers using Walk In facilities. Customer profile will be completed, per scope of this effort.

Who needs to be informed of planned actions?

- Employees
- Union Leadership
- Regulators
- Customers in affected communities (vs. company wide customer communication)
- Community organizations/Special Interest groups
- Customer Assistance Agencies
- City/Local government
Community Relations Manager

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How much lead time is necessary to implement the project?

Five (5) months

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ORGANIZATION – ROLES & RESPONSIBILITIES

Role	Responsibilities	Skills Required	Reporting Relationship	Salary Level
Manager of Community Relations	<ul style="list-style-type: none"> Develop relationships with elected officials, state and local levels, municipal and public safety officials. Presence of Utility leadership at certain events. Develop and execute community relations programs in line with corporate strategy and local market. Represent utility company in community as needed. Monitor the needs of customers as required. Develop positive relationships with local officials. 	<ul style="list-style-type: none"> Expertise in communication or related area. Outstanding written and verbal communication skills. Ability to establish and maintain positive relationships with internal/external customers 	<ul style="list-style-type: none"> Director of Community Relations 	\$80-\$100K
Project Manager	<ul style="list-style-type: none"> Responsible for planning, organizing and the execution of all necessary tasks to facilitate the closing of the offices. Insure that alternative customer avenues are in place. Work with the Manager of Customer Relations to effectively communicate with customers, regulators and communities. Closely interact with call center management. Virginia Anthony will assume this role for BSG/NU. 	<ul style="list-style-type: none"> Outstanding written and verbal communication skills. Ability to establish and maintain positive relationships with internal/external customers. Project management skills. Meet deadlines established and provide updates to Manager of Community Relations. 	<ul style="list-style-type: none"> Manager of Customer Care 	\$60-\$80K

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PERFORMANCE METRICS

Objective	Proposed Key Performance Indicator/ Capability to gather data	Target Value	Current Value
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FACILITIES & LAYOUT

Group/Physical Location	Facility Updates/Requirements	# of People to Support/ Timing	Key Issues to Address
Walk-in (close all locations)	<ul style="list-style-type: none"> • Reconfigure work stations and redeploy other office equipment and supplies • Removal of LAN connections and phone lines • Securing of facilities • Close and remove drop boxes • Removal of external signage • Removal of Equifax and Pos-ID terminals • Discontinue courier service 	<ul style="list-style-type: none"> • (2) following week • (1) following week • (1) on day of closing • (1) on day of closing • (1) on day of closing • one month before closing date 	<ul style="list-style-type: none"> • Cash records must be boxed and sent to storage • Cashier's cash advances will need to be disbursed (cash drawer, change fund, petty cash) • Information signage needs to be in place. (office closing, alternative payment locations and customer contact channels) • Plan to reconfigure must be ready to implement at end of day on closing day.

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EQUIPMENT & DELIVERY REQUIREMENTS

Group/Area	Physical Equipment/ Requirements	IT Requirements	Key Issues to Address
Walk-in	<ul style="list-style-type: none"> • Redeployment of PC's, Teller-cash equipment, telecom equipment, photocopier machines, fax machines, • Arrangements for "safe" removal • Removal and possible redeployment of video security equipment. • Install fax machines, computers with Internet access, and telephones for customer assistance • 	<ul style="list-style-type: none"> • LAN connectivity restricted to BSG/NU web site • Phones lines for telephones and fax machine for customer use 	<ul style="list-style-type: none"> • Work with Procurement Services on the redeployment of office equipment and furniture • Technology must be installed and tested one month prior to closing

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External Stakeholder Impact

Stakeholders	Issues	Suggested Resolution
Customers	<ul style="list-style-type: none"> Loss of customer accessibility to make payments. 	<ul style="list-style-type: none"> Additional payment locations by third party agency. Increase customer awareness of EFT and other alternative payment options.
	<ul style="list-style-type: none"> Loss of customer accessibility for face to face contact for billing & credit issue resolution 	<ul style="list-style-type: none"> Increase customer awareness of alternative customer contact channels, (IVR, Phone Center, Internet, etc.)
PUC/DTE	<ul style="list-style-type: none"> Potential increase of PUC and DTE complaints due to loss of local presence. Penalty for DTE calls regarding the close of the walk in facility 	<ul style="list-style-type: none"> Upfront communications with PUC & DTE. Dedicate a BGC/NU rep to expedite handling of these complaint calls. FTE to take on "ambassador" role in each walk in area for month of March. Request waiver from DTE for any calls regarding the office closing. Convince DTE that closing walk ins will lower operating costs; thereby helping to avoid rate increases.
Community Relations Manager	<ul style="list-style-type: none"> Customer communication 	<ul style="list-style-type: none"> Work with Community Relations Manager to develop and implement a communication plan. Include timeline and "talking points" for other company employees.
Communities	<ul style="list-style-type: none"> Loss of local walk in offices 	<ul style="list-style-type: none"> Develop a communication plan that encompasses all day to day interactions and communicates alternative channels to enable customer to conduct business. (i.e. step up involvement in community activities, financially support valid community affairs)
Legislators	<ul style="list-style-type: none"> Complaints from constituents due to loss of local walk in offices 	<ul style="list-style-type: none"> Up front communication. Develop plan to notify legislators of intentions and alternatives available for customers to conduct business.
Local Government	<ul style="list-style-type: none"> Complaints from residents due to closing of local off 	<ul style="list-style-type: none"> Develop communication plan to keep local officials abreast of changes and alternatives available to customers for conducting business.
Other	<ul style="list-style-type: none"> Loss of local direct contact and interaction 	<ul style="list-style-type: none"> Develop communication plan to address contact issues. Remove statement about CSR

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Assistance Agencies (City & State Welfare, Federal Fuel Assistance)		<ul style="list-style-type: none"> Dedicate non-union employee to Ambassador Role
Other <ul style="list-style-type: none"> Union Leadership 	<ul style="list-style-type: none"> Loss of CSR positions 	<ul style="list-style-type: none"> Develop a plan to address resource issues. Work with union officials to communicate and make available separation/reassignment/bump solutions by October 1, after plan is announced.

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GAP DEFINITION

Blueprint Component	Gap Description	Magnitude of Change (Significant, Moderate, Minimal, or No Change)
Process	Pos ID, Cromwell Waiver, Back Office Work	Significant
Organization		
Competency		
Performance		
Culture	Loss of local direct contact and interaction. Modify customer behavior regarding bill payment.	Significant
Facilities & Layout	Restructure to secure walk in areas	Significant
Application		
Equipment & Delivery	PC's, Telephones, Drop Boxes, Kiosks and Fax Machine	Significant

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GAP ANALYSIS OPTIONS & RECOMMENDATIONS

GAP Description	Options to Close Gaps with Recommendation	Next Steps
Failed Positive Identification, Cromwell Waiver	<ul style="list-style-type: none"> Customer must provide positive identification by mailing or faxing information; going to third party agent to provide documentation, utilizing notary to provide legal documentation. 	<ul style="list-style-type: none"> Communicating with Call Center, Training CSR's, Develop forms for customers, follow-up process, customer signature required by service tech for turn on
Loss of local direct contact and interaction	<ul style="list-style-type: none"> Provide "Ambassador CSR" for 30-60 days before closing, company wide customer communication awareness of other alternative payment options, expanding First Data Network. 	<ul style="list-style-type: none"> Train non-union employee to fill role of Ambassador in all existing walk-in offices, contact corporate communications to develop plan, contact First Data to expand network
Restructure to secure walk in area	<ul style="list-style-type: none"> Do not allow any entrance into front door; employees must enter through employee entrance only, construct some type of wall to separate all other employees from what was once walk in area. 	<ul style="list-style-type: none"> Work with Facilities Management to develop a plan to modify walk in area.
PC's, Telephones, Kiosks and fax machine	<ul style="list-style-type: none"> Utilize PC for Internet access for payment arrangements, meter reading, billing inquiries, etc. Utilize telephone to speak to CSR regarding problems that cannot be addressed by the internet or the IVR, install fax machine for customers to fax Cromwell or SS# with picture ID, Kiosks may potentially provide alternate method of interaction in select areas. 	<ul style="list-style-type: none"> Develop action plan with telecommunications and Facilities for installation and security of hardware, talk with vendor regarding purchase of Kiosks and investigate market survey provided by NIPSCO.
Modify customer behavior	<ul style="list-style-type: none"> Educate customers on alternative bill payment options. Provide agency listings, information on EFT, and encourage use of mail option by providing an initial postage paid envelope or coupons to cover payment agency transaction fee. 	<ul style="list-style-type: none"> Optimize revenue potential by determining correct processing fee at pay agent. Develop package for communicating payment options available.